

About us

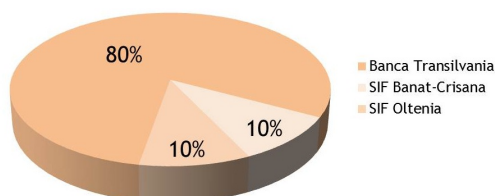
About us

BT Asset Management SAI is a specialized asset management company, member of the Banca Transilvania Financial Group.

The activity of asset management began in 2005, starting with a number of 500 customers and by 2016 we account more than 50,000 active customers and assets around 3.9 billion Ron (around 850 mil. Euro). The most important distinction that can be awarded to us by our customers is trust, and we are looking forward to increasing the number of partners and satisfied investors.

Our belief is that through our products we are solid supporters of the local entrepreneur spirit. We are a member of the Banca Transilvania Financial Group which proved understanding and support to those willing to become successful entrepreneurs. Thus, we supply investment opportunities for each of our customers, in order to use all the advantages offered by the capital market.

Along BT Asset Management are present some of the most important Romanian financial entities, such as Banca Transilvania, SIF Banat-Crisana and SIF Oltenia.



All these elements contributed to the increase of BT Asset Management in the Romanian investment fund industry, being present between the Top 4 asset managers in the market.

Starting with 01.01.2016 it is compulsory for BT Asset Management SAI SA to apply the reporting and fiscal diligence procedures arising from the new Code of Fiscal Procedure, which transposes the 2014/107/EU Directive concerning mandatory exchange of fiscal information through Common Reporting Standard (CRS).

BT Asset Management SAI is registered with LEI code: **25490007RQZBTI91HW10**, identifier for legal entities according to ISO 17442. LEI code clearly and uniquely identifies key information belonging to legal entities involved in financial transactions.

Our team

Due to our wish of being close to all investors, let's meet the Executive Board team in charge of asset management.

Aurel BERNAT - C.E.O

Aurel Bernat is a Babes-Bolyai University graduate in 2004, with degree in European Institution Management. In 2006 graduated post-university in Business Administration. Between 2005-2006 he performed at Banca Transilvania's International Public Relations team. The end of 2006 sees Aurel working for BRD - Groupe Societe Generale as a Corporate Advisor in Cluj-Napoca. In the summer 2007 he joined BTAM team, being responsible with customer contact

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and potential investors, implementing BT Asset Management SAI's development strategies. Between 2013-2015 he occupied the position of Head of Sales and between 2015-2017 Deputy CEO of the company.

For any information regarding investments contact

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Dorina JOSAN - Deputy C.E.O.

Dorina Josan has a Bachelor's degree in Artificial Intelligence from the University of Electronic Engineering Cluj-Napoca. For 10 years, starting with 1984, Dorina Josan has been an employee of the Artificial Intelligence's Institute, software design. Between 1994-1996 holds the position of scientific researcher, artificial intelligence, and networking. At the same time in 1994 Dorina Josan enters the capital market, mainly investment funds, developing different IT features used in the field. From 1995, becomes Chief Operating Officer (COO) for Creditanstalt Romania Cluj-Napoca, later for CA IB Asset Management, coordinating the operational activities. In 2005, Dorina has been part of the initial team to start BT Asset Management SAI as Deputy CEO until 2013 and CEO between 2013-2017.

The entire BT Asset Management team is completely dedicated to our customers, targeting an increase of the assets under management. At the same time, we focus on individuals who have not yet invested in the capital market, believing that for a future successful partnership both sides need to prove trust and respect.

We thank all our customers for choosing us and we kindly invite all our future partners to get acquainted!

